

**Select originating cluster**

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**Authorized Signature**

**Number:** SPD-IM-05-043  
**Issue Date:** 06/30/2005

**Topic:** Provider Information

**Subject:** Changes to Client Employed Provider Inquiry Screens

**Applies to (check all that apply):**

- |   |  |
|---|--|
| <input type="checkbox"/> All DHS employees                        | <input type="checkbox"/> County Mental Health Directors                  |
| <input checked="" type="checkbox"/> Area Agencies on Aging        | <input type="checkbox"/> Health Services                                 |
| <input checked="" type="checkbox"/> Children, Adults and Families | <input checked="" type="checkbox"/> Seniors and People with Disabilities |
| <input type="checkbox"/> County DD Program Managers               | <input type="checkbox"/> Other (please specify):                         |

**Message:** Please read the attached re: changes to the Client Employed Provider voucher inquiry screens. The new screens will be available on Tuesday, July 5, 2005.

*For questions about this information please contact:*

<b>Contact(s):</b>	DHS Helpdesk		
<b>Phone:</b>	503-945-5623	<b>Fax:</b>	
<b>E-mail:</b>			

## Changes to the Client Employed Provider Voucher Inquiry Screens

### **Overview**

Under the Collective Bargaining Agreement between SEIU and the Homecare Commission, DHS is required to begin withholding state and federal income taxes on HCW claims. A series of transmittals have been released in recent months describing this process.

Information on the estimated and actual tax withholding could not be displayed on the HINQ series screens due to space limitations. We have developed new screens that will display financial detail on authorized and paid voucher records. The new screens can be accessed from the HINQ screen.

Client Employed Provider voucher/claim information is now viewed through a series of screens:

HINQ – Voucher List – This screen displays a list of vouchers/claims. It is accessed from a blank screen.

HINV – Voucher General Detail Screen – This screen displays provider, client and general voucher/claim information. This screen is accessed from the HINQ screen.

HDTL – Voucher Financial Detail Screen – This screen displays the financial detail for the voucher/claim. It can be accessed from the HINV screen.

### **HINQ - Voucher List Screen**

The HINQ screen remains essentially unchanged from the previous HINQ screen. Staff may still search for voucher information by voucher number, provider number, or client prime number. Function key navigation has been added to make it easier to move around through the screens.

HINQ P,625971

VCH NMBR	PRCS TRANS	PRIM ID	RECIP NAME	PR NMBR	PROV NAME	SERV BEG	SERV END	CHK DATE	PAID
05041847	36	XX12345X	CLIENT	625971	PROVIDER,	050501	050502	050627	66.71
05041848	36	YY12345Y	PERSON	625971	PROVIDER,	050401	050415	050627	83.22
05041321	30	ZZ12345Z	RECIPIEN	625971	PROVIDER,	050201	050215	000000	.00

MSG 101 TOP OF DISPLAY.  
F3=EXIT F8=NEXT F11=HINV

The screen will return a list of vouchers/claims that meet the criteria entered. Users may select a particular record by placing the cursor next to the record (you may leave the space blank or put any in any character) and pressing enter or pressing F11.

When a record is selected, the user will be taken to the HINV screen.

### **HINV - Voucher General Detail Screen**

The HINV screen is essentially unchanged from the second screen in the old HINQ series, except that the financial detail has been removed. This screen displays provider, client, and general voucher information.

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HINV      P,625971
LAST CHG 05/06/27  WKR ID SA      MSG

VCH NMBR 05041847  PRCS TRANS 36 MSG  VCHR IN PAID STATUS-REGULAR
VCH XREF 00000000  CHK DATE 05/06/27  CHK NMBR 40252875  RA NMBR 5031783
ICN 1005178214113  PAY REF 00/00/00  VCH ADJ N  EOB 000
X REF (ICN) 00000000000000000000  PROV NMBR 625971
PROC      OC111  PROV NAME CLIENT, MISTER
BR        2211  ADDR
PRIM ID   XX12345X  PROV STR 123 ADDRESS ST
RECIP NAME PROVIDER, MISSUS  PROV CITY/ST ALBANY, OR
PRNT 598B 00/00/00  MAIL BR  N  COMPL ZIP 97321-0000
AUTHORIZED -----
SERVICE PERIOD      HR/DLY  HR/DAY  WAGE      MIL      MIL      HSKP HR  HSKP
AUTH BEG  AUTH END  WAGE  AUTH  AUTH  AUTH  AUTH$  HRS AUTH  PCT
05/05/01  05/05/02  9.0300  8.0  $72.24  0  $0.00  0  8  0
WORKED -----
SERV BEG  SERV END  HRS  GRS WAGES      MILE MILEAGE  VOL F/S
05/05/01  05/05/02  8.0  $72.24  0  $0.00  Y

      AUTH      PROV      RECIP
SIGN (DATE)  SIGN (DATE)  SIGN (DATE)
Y 05/05/01  Y 05/06/27  Y 05/06/27

F3=EXIT      F8=NEXT      F11=HDTL  F12=HINQ

```

When you are on the HINV screen, you may use the F7 and F8 keys to move forward and backwards within the list of vouchers that was retrieved when you entered HINQ. From the HINV screen, staff may return to the HINQ screen by pressing F12 or go to the next screen in the new series, HDTL, by pressing F11.

## HDTL - Voucher Financial Detail Screen

The HDTL screen displays the calculated financial detail for the voucher.

Remember that the financial information (e.g. federal taxes, state taxes, voluntary deductions) displayed on the voucher detail screens for unpaid and ready to pay vouchers is estimated information. When the voucher is actually paid, the screens are updated to reflect the actual withholding amounts, etc...

HDTL		Voucher Wage Detail				06/29/2005		
VCH NMBR	05041847	PRCS TRANS	36					
PRIM ID	XX12345X	Recip Name	CLIENT, MISTER					
PROV NMBR	625971	Prov Name	PROVIDER, MISSUS					
	SERV BEG	SERV END	HRS	HRLY WG	GRS WAGES	MILE	MILEAGE	VOL F/S
Auth	20050501	20050502	008.0	9.0300	\$72.24	000	\$0.00	Y
Paid	20050501	20050502	008.0	9.0300	\$72.24	000	\$0.00	Y
CALCULATED -----								
WAGES	\$72.24	MILEAGE	\$ .00	FD/SHLT		GROSS PAY		\$72.24
FEDERAL TAX		\$ .00	GROSS WAGES		\$72.24	GROSS PAY		\$72.24
STATE TAX	+	\$ .00	TOTAL TAXES	-	\$5.53	EMPR FICA	+	\$5.53
EMPL FICA	+	\$5.53	VOL DED	-	\$ .00	EMPR WCD	+	\$ .00
EMPL WCD	+	\$ .00	MILEAGE	+	\$ .00	BILL TOTAL	=	\$77.77
TOTAL TAXES	=	\$5.53	NET PAY	=	\$66.71			
MSG:								
F3=EXIT				F12=HINV				

## A special note about State and Federal Tax Withholding

All information about the provider's state and federal filing status, allowances, and additional withholding is entered into the Oregon ACCESS provider screens. Staff may view this information by looking at the provider record in the Oregon ACCESS system.

If the provider has elected to have an additional flat tax amount withheld from each paycheck, that amount is not displayed on the HINQ screens. The additional tax withholding amounts are calculated by check, not by voucher.

The Remittance Advice has been modified to include information regarding the filing status, allowances, additional tax withholding, and EIC elections on file for the provider. Remember that providers may change their tax withholding elections at any time by filing a new W4 form.

Remember that vouchers cannot be adjusted solely to refund previously withheld tax amounts. That means that if a provider changes his/her filing status or allowances, the local office cannot process an adjustment on a paid voucher, solely for the purpose of recalculating the taxes using the updated

filing status information. Once the withheld taxes have been forwarded to the government agencies, we cannot get a refund. Providers, like all tax payers, can go through the normal process of filing their taxes and getting any refund due to them.